IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

DONOR PROFILE APPLICATION

USER MANUAL

Version 1.7

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1. INTRODUCTION

This document describes the *Donor Profile* application of the *Iraq Development Management System (IDMS)*. It provides the necessary instructions that the user should follow during the data entry process. The document is addressed to those who will use the *IDMS* application to add or modify donor profile information.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. It is also a powerful tool for tracking and analyzing aid flows. The system serves as the main database and data collection and reporting system as it ensures effective access to aid data.

The main objective of *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

In the current version of *IDMS*, the following applications are present:

- **External Assistance Projects**
- **Donor Profile**
- **Capital Investments Projects**
- **Iraq Development Projects**
- **NDP Indicators**

The *Donor Profile* application in *IDMS* is designed to track information on the donor organisations providing assistance to the country. Once you have accessed this application, you are able to view the donor profile details and create different types of analytical reports in the *List*, *Chart*, and *Report* modules. Moreover, the *Donor Profile* application contains a built-in on-line data entry subsystem, which is designed to allow entering the donor profile related data remotely via Internet.

This *Donor Profile* application provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

Note: To ensure more flexibility and a more user-friendly environment, IDMS has been implemented as a bi-lingual system allowing the users to view the data presented in the system in two languages: English and Arabic.

3. DONOR PROFILE DATA ENTRY FORM

In the *Donor Profile* application (Figure 1), you can provide key information about a donor organisation that acts as an originator of funds for the project. The information to be provided includes the donor organisation / agency name, points of contact within the agency, donor's funding policy, the pledges, etc.

For more information on how to provide the information requested, refer to the table below:

Field Name	Instructions
Mission / Vision	Enter a brief description of the donor organisation / agency **Mission/Vision** statements.
Donor Contributions	Provide financial information on the **Donor Contributions**. For more details, see Managing Donor Contributions. Please note that all contribution in this field will be grouped according to the channels that the contributions are intended for. All amounts in the *Donor Contributions* field can be viewed either in USD (US Dollar) or IDQ (Iraqi Dinar). To switch between these options, select the appropriate value from the **All amounts are displayed in:** drop-down list above the field. Note: For all total amounts displayed in this field, you may see the amount converted to IDQ or USD by hovering the mouse cursor on the corresponding amount. If the IDQ amount is displayed, the tooltip will show the USD equivalent; and vice versa, if the USD amount is displayed, the tooltip will show the IDQ equivalent.
Pledges	Provide information about the funds pledged by the donor organisation. For more details, see Managing Pledges.
Offices	Provide information about the different **Offices** of the selected donor organisation / agency. For more details, see Managing Offices.
Contacts	Indicated the **Contacts** for the donor organisation / agency. They will be contacted with questions, suggestion, and/or comments. For more details, see Managing Contacts.
Funding Policy	Describe the **Funding Policy** adopted by the donor organisation / agency.
Source of Funds	Provide information about the **Source of Funds** for the donor organisation / agency.

Figure 1: Donor Profile Data Entry Form

3.1 Managing Donor Contributions

This chapter outlines how to add, edit and remove donor contribution records.

3.1.1 Adding a Contribution Record

In order to add a contribution record, follow the steps below:

1. Click the **Add Contribution** button at the bottom of the field. You will be directed to the *Add/Edit Contribution* sub-section (Figure 2).
2. Provide the information requested in the form.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Year	Select the **Year** when the contribution is made from the drop-down list. *This field is mandatory*.
Channel	Indicate the **Channel** to which the contribution is made by selecting the appropriate instance from the drop-down list. *This field is mandatory*.
Sector	Specify the **Sector** of economy that the contribution supports. *This field is mandatory*. Please note that selection of a sector filters the list in the *Sub-Sector* field and displays only those instances that are related to the selected sector.
Sub-Sector	Indicate the **Sub-Sector** of economy that the contribution supports.
Currency	Select the **Currency** in which the contribution is made. *This field is mandatory*. If you have selected the currency different from USD, the default exchange rate per 1 USD is provided in the field. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Amount	Enter the **Amount** contributed in the currency selected in the previous field. *This field is mandatory*.
Funding Type	Specify the **Funding Type** for the contribution. The following options are available: • Grant • Loan *This field is mandatory*.
Comments	Provide additional **Comments** both in the English and Arabic languages, if needed.

3. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.

Figure 2: Adding a Donor Contribution Record

In order to add another contribution, click the **Add Another Contribution** button and provide the information requested as described in the paragraphs above.

3.1.2 Editing Contribution Records

In order to edit an existing donor contribution record, follow the steps below:
1. Click the record that needs to be modified. You will be directed to the *Add/Edit Contribution* sub-section.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to apply the changes made. Or, click **Cancel** to discard them.

3.1.3 Removing Contribution Records

In order to remove an existing donor contribution record, click ✘ **(Remove from the list)** to the left of the selected record.

3.2 Managing Pledges

This chapter outlines how to add, edit and remove pledge records.

3.2.1 Adding a Pledge Record

In order to add a new pledge record, follow the steps below:
1. Click the respective **Add Pledge** button at the bottom of the field. You will be directed to the *Add/Edit Pledges* sub-section (Figure 3).
2. Provide the information requested in the form.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Year	Select the **Year** when the pledge is made from the drop-down list. *This field is mandatory*.
Event	Specify the **Event** during which the pledge is made. *This field is mandatory*.
Sector	Specify the **Sector** of economy that the pledge supports. *This field is mandatory*. Please note that selection of a sector filters the list in the *Sub-Sector* field and displays only those instances that are related to the selected sector.
Sub-Sector	Indicate the **Sub-Sector** of economy that the pledge supports.
Currency	Select the **Currency** in which the pledge is made. *This field is mandatory*. If you have selected the currency different from USD, the default exchange rate per 1 USD is provided in the field. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Amount	Enter the pledge **Amount** in the currency selected in the previous field. *This field is mandatory*.
Funding Type	Specify the **Funding Type** for the pledge. The following options are available: • Grant • Loan *This field is mandatory*.

Comments	Provide additional **Comments** both in the English and Arabic languages, if needed.

3. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.

Figure 3: Adding a Pledge Record

3.2.2 Editing Pledge Records

In order to edit an existing pledge record, follow the steps below:
1. Click the pledge record that needs to be modified. You will be directed to the *Add/Edit Pledges* sub-section.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to apply the changes made. Or, click **Cancel** to discard them.

3.2.3 Removing Pledge Records

In order to remove an existing pledge record, should click ✖ **(Remove from the list)** to the left of the selected record.

3.3 Managing Offices

This chapter outlines how to add, edit and remove office records.

3.3.1 Adding an Office Record

In order to add a new office record, follow the steps below:
1. Click the **Add Office** button at the bottom of the field. You will be directed to the *Add/Edit Office* sub-section (Figure 4).
2. Specify the **Office Name** in the English and Arabic languages.
3. Provide the postal **Address** for the office in the English and Arabic languages.
4. Indicate the **Mobile** phone number of the office in the respective field.
5. Specify the **E-mail** address for the office.
6. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.
7. In the DONOR PROFILE DATA ENTRY FORM, specify which office serves as a primary one for the donor organisation.

Figure 4: Adding an Office Record

In order to add another office record, click the **Add Another Office** button and provide the information requested as described in the paragraphs above.

3.3.2 Editing Office Records

In order to edit an existing office record, follow the steps below:
1. Click the donor organisation office record that needs to be modified. You will be directed to the *Add/Edit Office* sub-section.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to apply the changes made. Or, click **Cancel** to discard them.

3.3.3 Removing Office Records

In order to remove an existing office record, click ✖ **(Remove from the list)** to the left of the selected record.

3.4 Managing Contacts

This chapter outlines how to add, edit and remove contacts.

3.4.1 Adding a Contact

In order to add a donor organisation contact record, follow the steps below:
1. Click the **Add/Edit Contacts** button at the bottom of the field. You will be directed to the *Add/Edit Contact* sub-section (Figure 5).
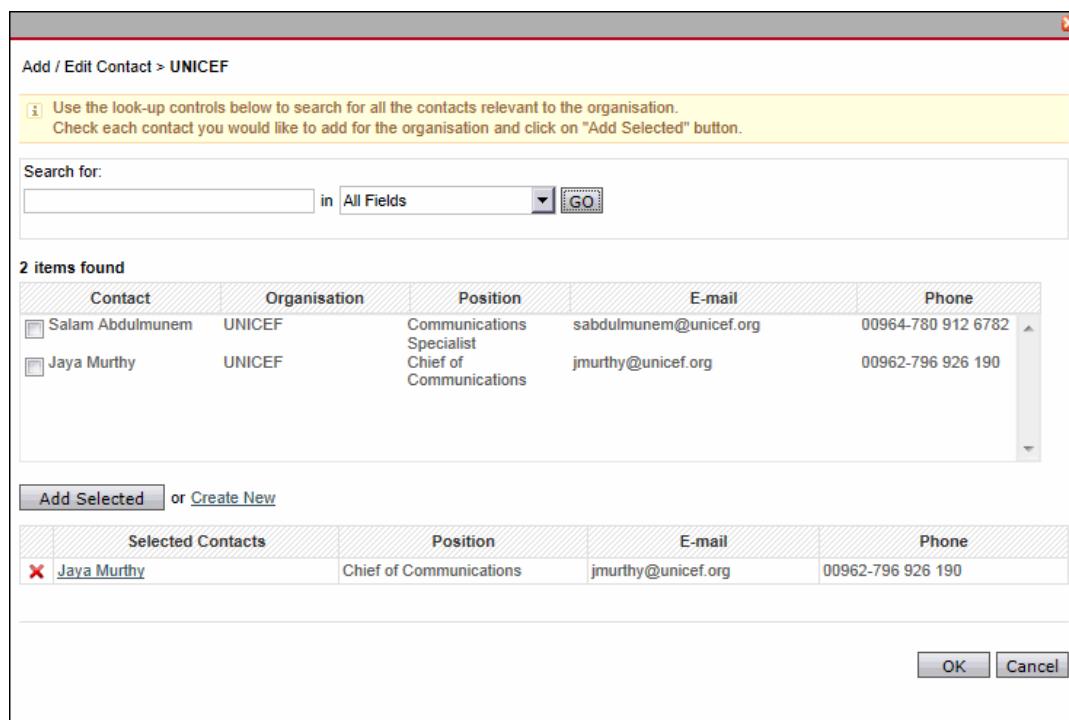

Figure 5: Selecting a Contact

2. Locate the appropriate contact(s) in the list displayed.
   Note: To make it easier to locate the appropriate contact in the long list, the system has a search capability. To find the relevant contact, enter the search criteria in the respective field

and define what field to look in. Then click the **GO** button. The list of all contacts matching the criteria will be displayed in the *Contacts* table.

3. Add the selected contact(s) by ticking the check-box to the left of the contact name and clicking the **Add Selected** button. The selected contact(s) will appear in the *Selected Contacts* table.

   Note: If the desired contact does not exist, you can create a new contact record. For more details, see Creating a New Contact.

4. In the DONOR PROFILE DATA ENTRY FORM, specify which contact serves as the focal point for the donor organisation.

3.4.2 Creating a New Contact

In order to add a new contact, follow the steps below:

1. Click the **Create New** link at the bottom of the *Contacts* table. A new window will appear (Figure 6).

Figure 6: Adding a Contact Record

2. Indicate the donor organisation **Office** that the contact represents.
3. Fill in the contact's **First Name** and **Last Name** in the respective fields. *These fields are mandatory.*
4. Indicate the **Position** that the contact occupies in the organization in the English and Arabic languages.
5. Specify the contact's **E-mail** address in the appropriate field. *This field is mandatory.*
6. Indicate the contact's **Phone Numbers** (**Mobile**, **Business**, and **Home**) in the respective fields. *The Business phone is mandatory.*

7. Enter the contact's **Fax** number in the respective field.
8. Provide the contact's address in the **Address** field. *This field is mandatory.*
9. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.

3.4.3 Editing Contact Records

In order to edit an existing donor organisation contact record, follow the steps below:
1. Click the contact record that needs to be modified. You will be directed to the *Add/Edit Contact* sub-section.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to apply the changes made. Or, click **Cancel** to discard them.

3.4.4 Removing Contact Records

In order to remove an existing donor organisation contact record, should click ✖ **(Remove from the list)** to the left of the selected record.

4. SAVING DATA

When you have finished with data input or modification, you should save your changes before you leave the page. The following options for saving the data are available both at the top and bottom of the page:

- **Save** - to save the data entered and to remain on the opened page.
  Note: In sub-sections, clicking the **OK** button will save the changes made and to navigate you to the previous screen.
- **Save and Close** - to save the information input and leave the opened page.

If you wish to cancel your changes, use the **Cancel** button.

5. REFERENCES

Please refer to the following IDMS related documents:

- IDMS External Assistance Projects Application User Manual
- IDMS Capital Investments Projects Application User Manual
- IDMS NDP Indicators Application User Manual
- IDMS Analytics User Manual
- IDMS Administration Center User Manual